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Rubber World

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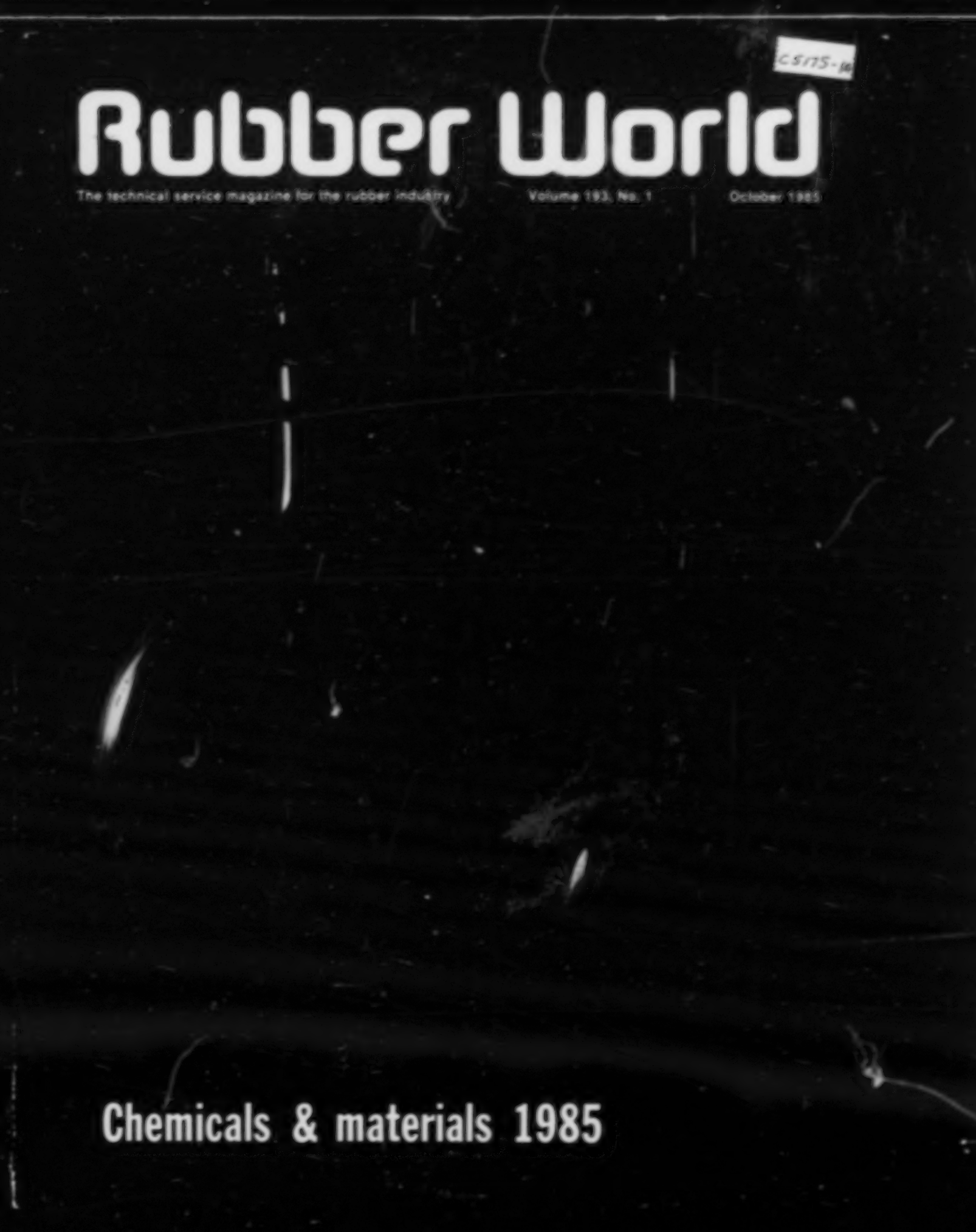

Chemicals & materials 1985

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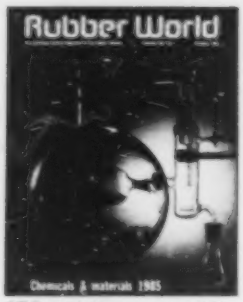

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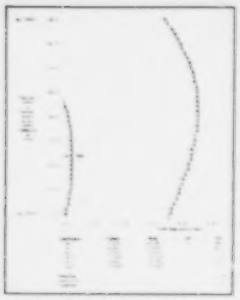

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RMA industrial products market forecast 1985-1990

Hose — (all reinforced hose, rubber or plastic, except garden hose. It is comparable with the total dollar shipments in the U.S. Bureau of the Census SIC Codes, 30413, 30414, and 30416, minus exports, plus imports.)

1985	1986	1987	1988	1989	1990	Annual Growth
$1115	$1115	$1150	$1180	$1210	$1240	2.5%

Flat belting (all conveyor, elevator and flat transmission belting of rubber or plastic. It is comparable with the total dollar shipments in the Bureau of the Census SIC Code 30411, minus exports, plus imports.)

1985	1986	1987	1988	1989	1990	Annual Growth
$345	$340	$347	$352	$358	$362	+1.0%

V-Belts (all power transmission belts including industrial and automotive other than flat, of rubber or plastic, including belts made for original equipment and replacement. It is comparable with the total dollar shipments in the Bureau of the Census SIC Code 30412, minus exports, plus imports.)

1985	1986	1987	1988	1989	1990	Annual Growth
$500	$495	$510	$525	$540	$555	2.1%

and sealant applications throughout the U.S. and for consumer and industrial applications in the Southwest and West Coast; **Great Lakes Terminal and Transport**, Chicago, will distribute consumer and industrial Kraton east of the Rocky Mountains and **Tiros Plastic**, Yonkers, NY to distribute Elexar rubber for wire and cable insulation and jacketing applications east of the Rockies.

Markets, news

Production of carbon black in the U.S. in the second quarter of 1985 was the lowest since the third quarter of 1983. The 292 thousand metric tons produced is a 15% decline from the same period last year. Shipments of 285 thousand metric tons were 16% lower than the 1984 second quarter according to Columbian Chemicals.

For the first half, both production of 599 MMT and shipments of 593 MMT decreased 10% from the year earlier level. Demand in all grades were down, ranging from 8% in N-600 to 15% in N-500.

Plant inventory rose 7% during the quarter to 102 MMT, a one-month supply, varying from four weeks in N-300, N-500 and N-600, five weeks in N-200 and N-700 to almost six weeks in N-100.

U.S.A. dry rubber hydrocarbon consumption of 595 thousand metric tons was the lowest since the third quarter of 1983, with both SBR and polybutadiene down to the lowest since the first quarter of 1982. Year-to-date consumption declined 5% from the first half of 1984 to 1,263 MMT.

Both rubber ratios during the quarter were lower than the year before: the synthetic share, from 73.7% to 70.8% and the carbon black, from 52.9 to 46.7 per hundred rubber.

The Industrial Products Division of the Rubber Manufacturers Association annual forecast for the next five years shows little growth in all reporting segments. The forecast for growth through 1990 will be slightly more than 2% which is keeping with the historical growth trend for hose and belting. The RMA felt that the pickup in economic activity experienced by the industry in late 1984 and the first six months of 1985 should begin to ease up during the latter part of 1985. The general view is that current economic conditions are in a holding pattern which any shock could send into an economic recession. The industry's strong dependence upon both the automotive and mining sectors of our economy are likely to place the industry at the lower end of any growth pattern during the coming years. The totals shown for each product (see table) represent United States demand. This includes domestic shipments less exports, plus imports. Forecasts for 1985 through 1990 are in millions of dollars, and are at a fixed level in constant dollars, at the value of the dollar in 1985. The forecast is based on information from 70 companies.

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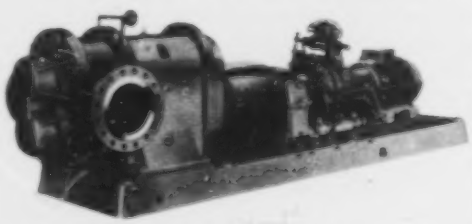
Lederle Rotary Piston Pumps



- Rated Capacities to 250 cubic meters per hour.
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- Can be supplied with any type drive as required.
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